CLOUD RESEARCH REPORT

Amazon and Microsoft Duke It Out for Public Cloud Dominance

There's really no surprise that Amazon Web Services (AWS), Microsoft Azure and Google Cloud Platform constitute the three biggest public cloud players – in that order.

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Organizations deploying workloads in the public cloud look for a comprehensive menu of cloud services, cost-effectiveness, flexibility (ease-of-use) and a relatively long track record that underscores service reliability. AWS has been one of the longest public cloud players and it tops the short list at 28%. But AWS also brings an impressive swath of capabilities – often leading with specialized compute services like Lambda for event-driven (serverless) computing, along with comprehensive management and development/deployment tools.

Microsoft Azure, long a distant second to AWS, seems to be gaining ground at 26%. This is likely related to the sheer size and dominance of Microsoft in data center operations. Microsoft's strategy appears to emphasize and reinforce the relationship between data centers with Windows Server, virtualization with

Hyper-V and the cloud with Azure. The result is a seamless hybrid integration that offers powerful appeal for local/cloud migrations.
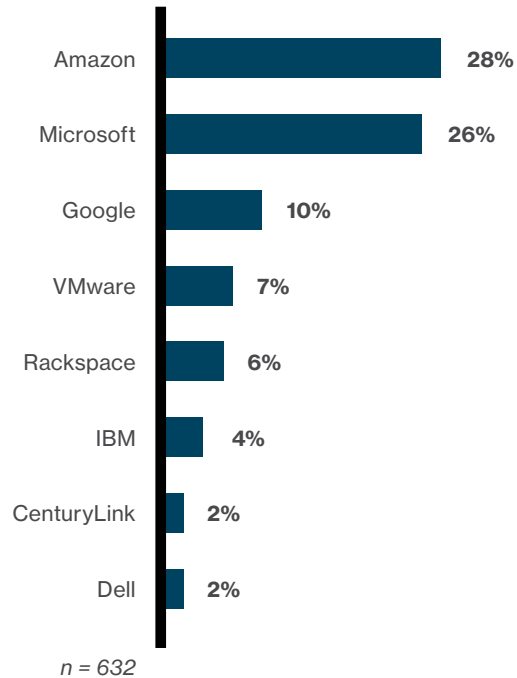
Google Cloud Platform currently occupies a third spot at just 10%. But even this represents an uptick in Google as a major cloud player. And while Google provides an impressive suite of services, its principle emphasis appears focused on big data and machine learning capabilities which, while important, don't cater as closely to the more immediate needs of workload development and deployment touted by AWS and Azure.

Beyond the top three players, providers including VMware, Rackspace, IBM, CenturyLink and Dell are generally niche solutions that have yet to find a broader footing in services, flexibility, and cost. For example, IBM is renowned for their machine learning and analytical capabilities, but typically aren't the go-to provider for fast, flexible, low-cost development efforts or mundane archival data storage.

See data on next page

Off-premises Public cloud/IaaS, not a virtual cloud Top Vendors on the Short list

A quarterly metric measuring the instances a technology vendor completed (shortlisted) for a deal ("n =" represents the count of vendor occurences on the shortlist).

Amazon — **28%**
Microsoft — **26%**
Google — **10%**
VMware — **7%**
Rackspace — **6%**
IBM — **4%**
CenturyLink — **2%**
Dell — **2%**

n = 632

Source: Cloud Infrastructure Post Purchase Report: Off-Premises Public Cloud/IaaS Q1-Q2, 2016

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For more information about TechTarget Research Peer Network, contact us at
TechTargetResearch@techtarget.com

TechTarget

275 Grove Street, Newton, MA 02466

888.274.4111

DemandGeneration@techtarget.com

www.techtarget.com